PDF RAD Web Portal User Guide

Department of Health Care Services (DHCS)

CA-MMIS

Publish Date: March 23, 2018

Table of Contents

Overview

Objectives

The purpose of the *PDF RAD Web Portal User Guide* is to provide approved users with step-by-step instructions to view and download a PDF version of the paper *Medi-Cal Financial Summary* and *Remittance Advice Details* (RAD) in electronic format from the Medi-Cal website. Choosing this option, and opting out of receiving paper RADs, will reduce paper waste and is in line with the Department of Health Care Services' (DHCS's) continued effort to "go green."

Introduction

The RAD is designed for line-by-line reconciliation of claim transactions. Reconciliation of the RAD to providers' records will help determine which claims are paid, denied or not yet adjudicated. Through the Medi-Cal website, providers will be able to view and download current and historical PDF RADs and *Medi-Cal Financial Summary* documents on the Transaction Services page (*https://www.medi-cal.ca.gov/eligibility/login.asp*). As part of this service, providers will be able to "opt out" of receiving paper RADs. The new secure service is part of Medi-Cal's continuous effort to improve service speed and convenience for its providers.

IMPORTANT: First-time PDF RAD Web Portal users must have a completed and approved *Medi-Cal Point of Service (POS) Network/Internet Agreement* on file and have received a Medi-Cal provider number or National Provider Identifier (NPI) and Medi-Cal Provider Identification Number (PIN). Refer to the Transaction Enrollment Requirements page on the Medi-Cal website for more information.

Reporting Problems

Report problems to the Telephone Service Center (TSC) at 1-800-541-5555 (Monday – Friday 8 a.m. – 5 p.m.).

Providers are encouraged to print the TSC Main Menu Prompt Options and keep it near their telephones for faster access to TSC resources.

- Select the language option (English or Spanish)
- Option 1 for provider
- Option 4 for the Technical Help Desk

Internet Transaction Equipment and Software

The following equipment and software are required for viewing, accessing and downloading current and historic PDF RAD/*Medi-Cal Financial Summary* documents:

- **Computer:** Windows 98 operating system or higher; Pentium I processor (1.33 MHz or higher), minimum 32 MB RAM
- **Modem Speed:** Minimum 28 Kbps
- Printer (optional)
- **Browser:** Google Chrome, Internet Explorer 7 and above, Firefox 3.6 and above, Safari 5 and above
- Adobe Acrobat Reader version 4.0 or higher for downloading current and historic PDF RADs

Note: The latest version of the software and browsers can be downloaded for free on the Web Tool Box page of the Medi-Cal website.
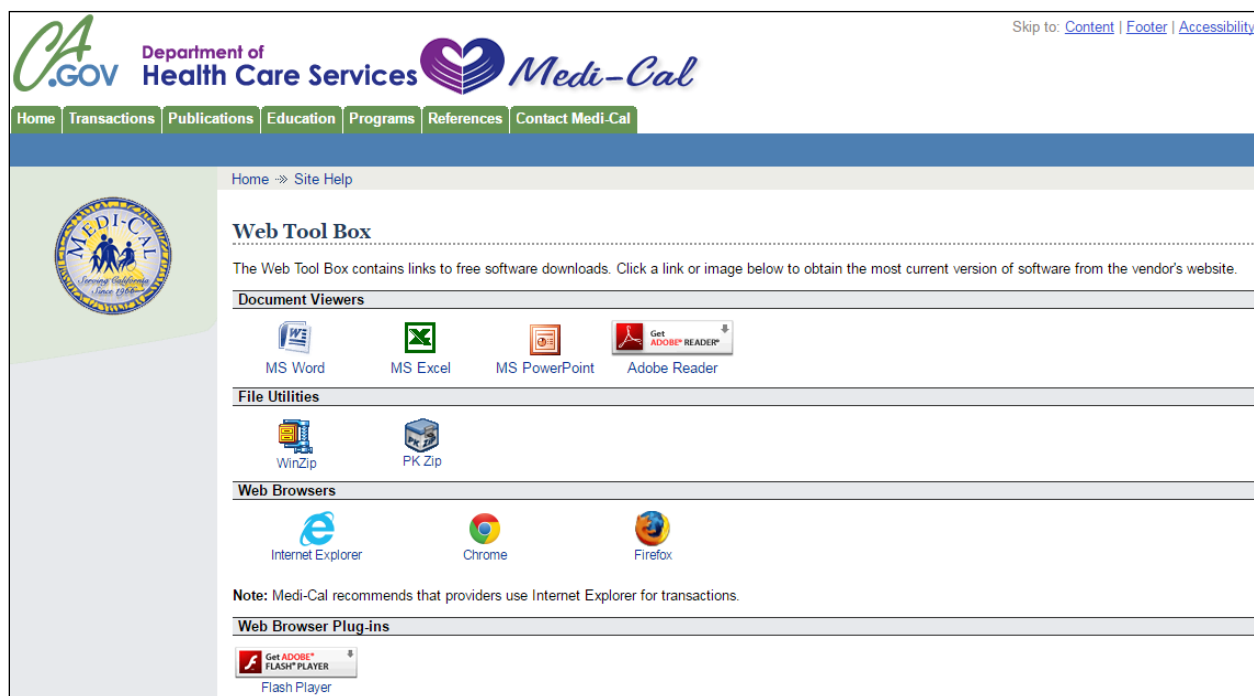
Web Tool Box

Before accessing the PDF RAD Web Portal, you should know how to access the Web Tool Box for the appropriate software applications needed to perform the internet downloads and transactions. From the Medi-Cal home page, click the **Web Tool Box** link at the bottom of the page. A separate screen will open and display all of the tools you need to access the PDF RAD Web Portal.

The Web Tool Box screen is below.
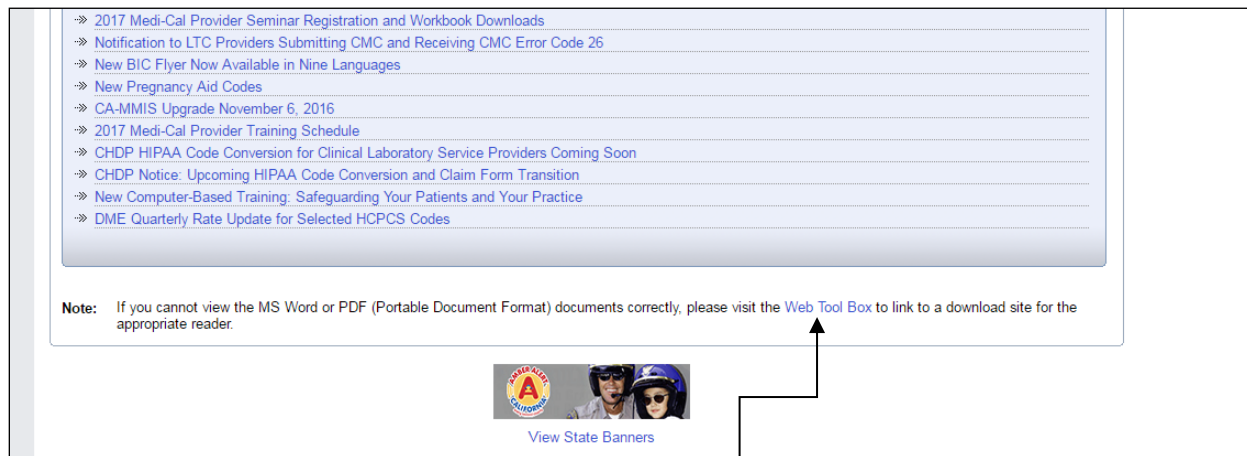
Web Tool Box link

Web Tool Box

Performing PDF RAD Web Portal Transactions

This section contains information regarding the requirements and special considerations, assumptions and constraints that the project team has identified.

Objectives

In this section, you will learn how to:

- Access the PDF RAD Web Portal from the Medi-Cal website
- Download current and historic PDF RAD/*Medi-Cal Financial Summary* documents
- Understand error messages that may occur when attempting to access historic RADs
- "Opt out" of receiving paper RADs

Access the PDF RAD Web Portal via the Transactions Page

1. Type **www.medi-cal.ca.gov** in the address bar of your browser, and then press ENTER on your keyboard to open the Medi-Cal home page.

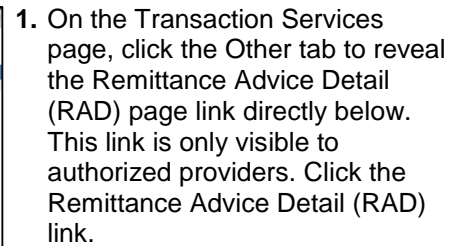2. Click the **Transactions** tab to open the Login to Medi-Cal page.
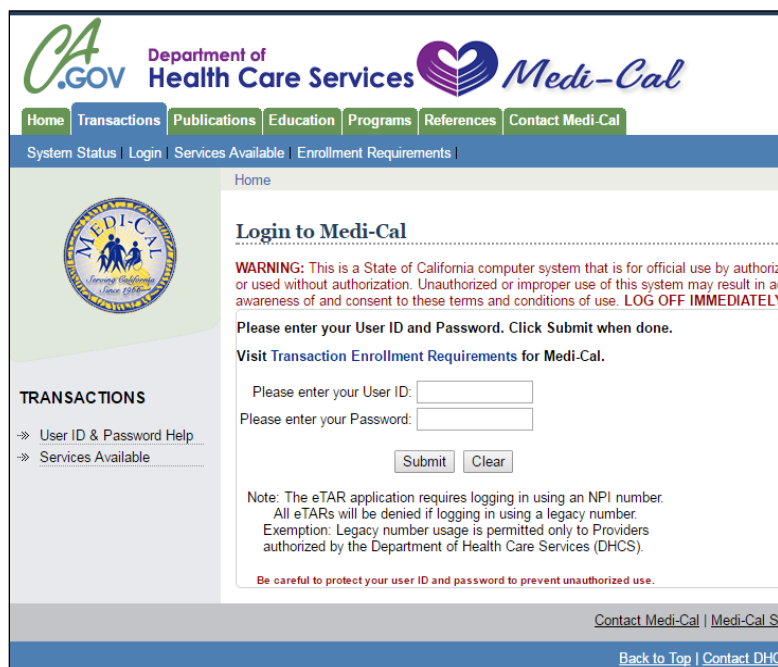
3. Enter your Medi-Cal provider number or National Provider Identifier (NPI) in the *Please enter your User ID* field.

   Enter your seven-digit Provider Identification Number (PIN) in the *Please enter your Password* field and click **Submit**. You are now logged on.

   After logging on, the Transaction Services screen opens, displaying one or more tabs that contain all of the transactions available to you. Click each tab to locate specific services.

   IMPORTANT REMINDER: After you log on, you will be timed out if you are idle on any screen for longer than 20 minutes. Any information you have entered will not be saved. If you are timed out, you must log on again and repeat the previous steps.

Download Current PDF RADs

1. On the Transaction Services page, click the Other tab to reveal the Remittance Advice Detail (RAD) page link directly below. This link is only visible to authorized providers. Click the Remittance Advice Detail (RAD) link.

   Note: You may also find this link under the Transactions banner on the left side of the page under Other.

2. The table below "Current RADs" displays up to six weeks of available PDF RADs/*Medi-Cal Financial Summaries*. Clicking on a RAD file will bring up a separate window from which you may choose to open the zipped contents or save to your desktop.

   Note: For RADs that exceed 1000 pages, the PDF will be broken into multiple ZIP files of up to 1000 pages each. For instance, if the provider has 1500 pages of RADs, two ZIP files will be provided: one with 1000 pages and the other with the remaining 500 pages. Also, the *Medi-Cal Financial Summary* will be present in the first ZIP file only.

Download Historic PDF RADs

1. To request a historical RAD, choose the RAD checkwrite year, month and day, and then click **Submit**.

   Note: The requested historical RAD will be available after one business day to view or download.

2. A message will display in **green** if your request has been submitted successfully.

3. When the request for a historical RAD is made, the status field within the Requested Historical RADs table will show the request as "Pending." When the RAD files are available, the request status will show "Processed."

4. Clicking on a RAD file will bring up a separate window from which you may choose to open the zipped contents or save to your desktop. The requested historical RAD will be available for the provider to download for 30 business days.

5. Upon initial implementation, the database will only have up to eight months of data. Over time the historical PDF RAD database will hold up to three years of RAD data.

Typical Error Messages

The following are examples of error messages that may occur when requesting historical RADs and the associated reasons/scenarios that may have been the cause.

> **Error:** System is unavailable to process your request. California providers may call toll-free 800-541-5555 and Out-of-State providers may call 916-636-1960.
>
> **Reason:** This error message will display when the provider cannot download an available historical RAD due to technical issues.

> **Error:** You must enter the Year.
>
> **Reason:** This error message will display when the provider does not enter the year and clicks submit to request a historical RAD.

> **Error:** You must enter the Month.
>
> **Reason:** This error message will display when the provider does not enter the month and clicks submit to request a historical RAD.

> **Error:** You must enter the Day.
>
> **Reason:** This error message will display when the provider does not enter the day and clicks submit to request a historical RAD.

> **Error:** The requested RAD is not available on the online system. California providers may call toll-free 800-541-5555 and Out-of-State providers may call 916-636-1960.
>
> **Reason:** This error message will display when the provider chooses a date for a historical RAD that is past three years from the date requested. (Note: Upon initial implementation, the database will only have up to eight months of data. Over time the historical PDF RAD database will hold up to three years of RAD data.)

Error: You have already requested the RAD for <Date> which is being processed now and will be available next business day.

Reason: This error message will display when the provider requests a historical RAD that was already requested and is in process.

Error: Your requested RAD is available to download in Historical RAD section of this page.

Reason: This error message will display when the provider requests a historical RAD that was previously requested and is already available to download.

Error: The Requested RAD is available in the Current RADs tab.

Reason: This error message will display when the provider requests a historical RAD with a date up to six weeks from the date requested.

**Error:** Future dated RAD requests are not available. Please check your selected date.

Reason: This error message will display when the provider enters a future date from the date requested.

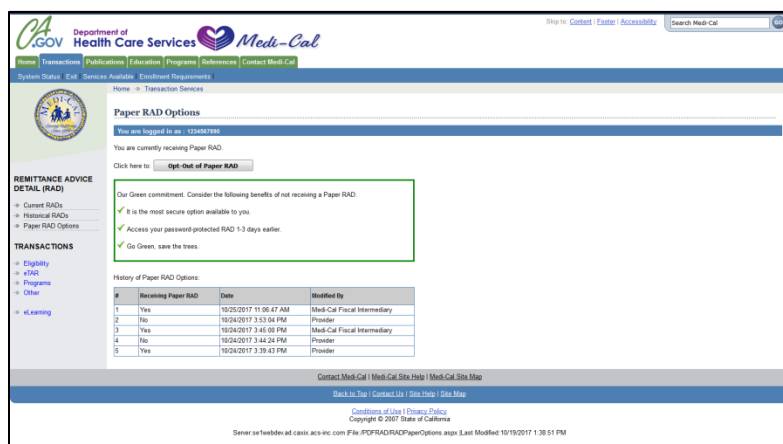**Error:** Our records indicate no RAD was issued to you for the requested date.

Reason: This error message will display when the provider chooses a date for a historical RAD that did not exist during that time period.

"Opt out" of Receiving Paper RADs
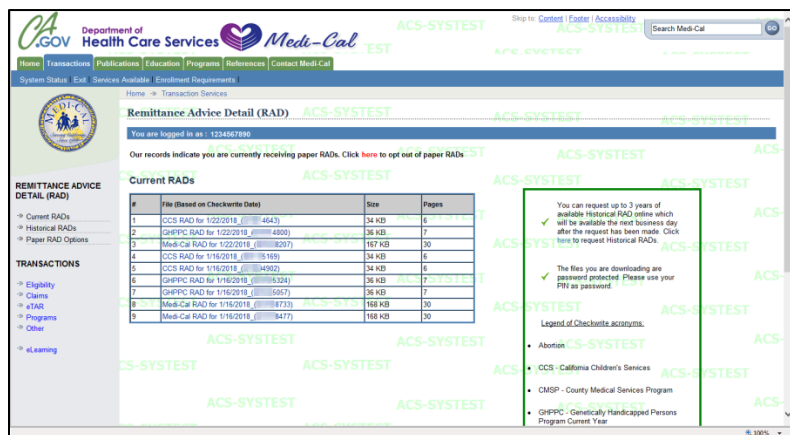
"Opt Out" of Paper: Go Green!

1. On the Current RADs page, click the **here** link if you wish to "opt out" of receiving paper RADs (go green).

2. On the Paper RAD Options page, click the "Opt-Out of Paper RAD" then click "OK" if you no longer wish to receive hardcopy RADs.

   Note: The request to stop receiving Paper RADs will be effective as of the next payment cycle from the day the request is made.

   Opting out of a paper RAD only applies to the RAD detail pages. You will still continue to receive the paper *Medi-Cal Financial Summary.*

Frequently Asked Questions

1. **What are the PDF RAD and Medi-Cal Financial Summary?**
   PDF RAD and *Medi-Cal Financial Summary* are PDF versions of your paper *Remittance Advice Details* (RAD) and *Medi-Cal Financial Summary*.

2. **What are the benefits of PDF RAD?**
   - The PDF RAD (and embedded financial summary information) will be available earlier than paper RADs and financial summaries.

   - The PDF RAD and financial summary will contain all the information of paper RADs and financial summaries.

   - Up to six calendar weeks of current RADs will be available for immediate download. In addition, a historical RAD database will be built up over time. When complete, three years of historical RADs will be available within one business day of a request.

   - Providers will have the ability to opt out of receiving paper RADs online and help California go green.

   - Printed versions of the online PDF RADs will be adequate to submit as supporting documentation with *Claims Inquiry Forms* (CIFs) and *Appeal Forms*.

3. **How do I sign up to receive PDF RAD?**
   You can access your PDF RADs by visiting the Medi-Cal website and logging in to the Transaction Services page. Click the Other tab and select "PDF RAD." To access the Transaction Services page, you must have an NPI and PIN, and have a signed *Medi-Cal Point of Service (POS) Network/Internet Agreement* form on file.

4. **Can I use the printed versions of the online PDF RADs for my CIFs and Appeals?**
   Yes.

5. **Can I turn off paper RAD?**
   You will have the ability to opt out of receiving paper RADs online and help California go green.

6. **Does the PDF RAD contain the Payment number?**
   No, the PDF RAD does not contain the Payment number.